



User Role Manager

In Settings → User Role Manager you can create specific roles/permissions for users. The list is populated with the 13 Trackplan Roles.

Create your own by clicking 'Create New Role'. Give the Role a name and description and click Update.

By clicking the 'Pencil' icon you can then choose from the list of 88 different permissions.

+ CREATE NEW ROLE				
Role	Description	Permissions	Is Client Created	
		0	Yes	<div>UPDATE</div> <div>CANCEL</div>
Client Role - Requests Only	Client Role - Requests Only Can create and view job requests. No access to jobs, form designer, assets, stock, resource, costs, time records, quotes	7 	No	<div>Duplicate Role</div>
Job Only	Can create jobs. Cannot choose or instruct or reschedule resource. No access to form designer, assets, stock, resource, costs, time records, quotes	11 	No	<div>Duplicate Role</div>